Aspirant

| LEADERSHIP TOOLKIT |

REMOTE WORKING

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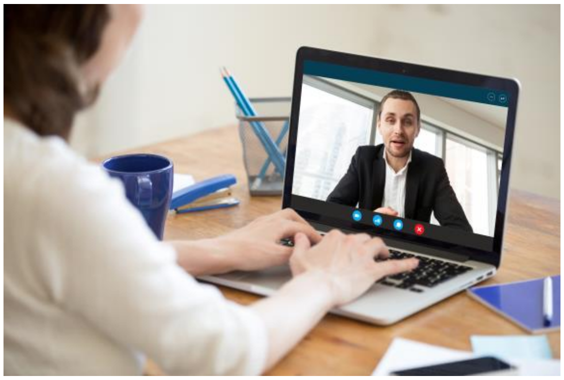
QUALITY REMOTE INTERACTIONS

ALL INTERACTIONS REQUIRE YOU TO FOCUS ON HOW YOU ENGAGE WITH OTHERS – ESPECIALLY WHEN WORKING REMOTELY



FOUR STEPS TO QUALITY INTERACTIONS

1. **SPEAK CLEARLY & OBJECTIVELY**
2. **QUESTION WITH PURPOSE**
3. **LISTEN ACTIVELY**
4. **ACT WITH INTENTION**

SPECIFICALLY FOR REMOTE WORKING

1

SPEAK CLEARLY & OBJECTIVELY

Tone and intention can be difficult to gauge on a call and when communicating via email or instant messaging, such as Skype, Teams and Slack

- *Use "I" statements — avoid "you" – to clarify your focus*
- *Take ownership — don't blame the company – to demonstrate sincerity*
- *Use facts & data — not judgements – to keep the conversation on the topic at hand*
- *Be direct – don't hint or use sarcasm – to avoid confusion and being misconstrued*

2

QUESTION WITH PURPOSE

Many people struggle finding openings during calls and rapid-fire written communication, such as email chains and group messages

- *Use open-ended questions to learn more, or gather more information and keep the conversation going:*
  - How do you feel about the change? What do you think will be the outcome?
- *Use closed-ended questions to minimize or close the conversation:*
  - Have you heard about the change? Can you live with the decision?

3

LISTEN ACTIVELY

Demonstrate your engagement with what others are saying to show agreement/disagreement for them to react to

- *Use video and encourage others to continue by using non-verbal ("head nod, smile") and verbal cues ("Interesting. Go on.")*
- *Give others time to get off mute (or ban mute completely) to ensure everyone is heard*
- *Paraphrase what was said to ensure you heard what was intended "What I heard you say…"*
- *Reflect feelings to show empathy and clarify your understanding "It sounds like you felt…"*

4

ACT WITH INTENTION

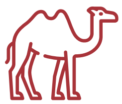
- *70% of communication is through actions, not words – you cannot overutilize facial expressions and hand gestures on video*
- *Be purposeful in the way you interact with others to avoid being misunderstood*
- *Utilize emotional intelligence to understand your environment and others' willingness to engage and plan your interactions accordingly – people may want a warning before being asked to comment*

TEAM "COMMUTE CHECKS" FOR ENGAGEMENT

INFORMALLY GAUGING EMPLOYEE MORALE CAN HELP IDENTIFY RISKS BEFORE THEY CAUSE PROBLEMS

ON THE SCALE OF RIDING A CAMEL TO FLYING IN A PRIVATE PLANE…

Back of a Camel



City Bus

Bullet Train

Private Plane

…ASK YOUR TEAM:

- ✓ *Overall, how are you feeling?*
- ✓ *Are you engaged and connected?*
  - *Teamwork, new skills, fun and interesting*
- ✓ *Is the work sustainable?*
  - *Pace, speed and workload*
- ✓ *How is the team support?*
  - *Environment, cohesion and brokers*

Tip: If transportation does not resonate with your team, adjust to other topics, e.g., hotel chains for "hotel check-ins" (Motel 6 to Ritz Carlton)

Leaders need to check in with their team regularly. Spend two minutes for each of your direct reports twice per month. Ask them how they are doing, whether they are engaged, if their work is sustainable and if they are receiving the support they need to succeed.
Use this casual scale to keep the conversation light – and honest – but dig deep to determine what is working and what needs to change.

- ***Camel*** – if your staff is riding on a camel, they may be disengaged or in need of support; determine how you can help right then
- *City Bus* – staff on the city bus are making progress, but are missing something; work with them to get them to where they need to be
- *Bullet Train* – for staff on a bullet train, make sure they can keep the momentum; identify what's working and make sure it continues
- *Private Plane* – staff that are riding comfortably on a private plane should be fostered; channel their engagement across the team
- *Combination* – your staff may be riding a camel on top of a bullet train; capture what is working and remove barriers to success

COMMUTE CHECKS RAPIDLY ASSESS TEAM ENGAGEMENT



MANAGING YOUR TIME

WAYS TO CARVE OUT TIME IN YOUR DAY AND LEVERAGE YOUR MOST VALUABLE ASSET – TIME

COMPLETE AN ANALYSIS OF YOUR CALENDAR

1. Strategically determine your desired percentage of time to be spent with each stakeholder
2. Track your time for 3 weeks to determine the actual percentage of time spent with each stakeholder
3. Analyze your calendar by asking these questions and seek opportunities to close the gap using the tips at the bottom of this page
   - *What activities were you pulled into that should have been avoided?*
   - *Where could you reduce time in activities by being more focused or vocal?*
   - *When you had break-ins (others attempting to get time on your calendar without your approval), did you say “no” and communicate your plans?*

HOW WOULD YOU OPTIMALLY ALLOCATE YOUR TIME? HOW CAN YOU RE-ALLOCATE TO ENSURE FOCUS ON STRATEGIC PRIORITIES?

Formal & informal time spent with key stakeholders during the week		*Desired % of time with stakeholder*	*Actual % of time with stakeholder*	*Opportunities to close the gap*
Unit Lead / CEO	*1:1 with Lead*	____ %	____ %	
Supervisor	*1:1 with supervisor*	____ %	____ %	
Cross-functional Peers	*Full team(s) or 1:1*	____ %	____ %	
Peers	*Full team or 1:1*	____ %	____ %	
Staff	*All reporting staff*	____ %	____ %	
External	*All external parties*	____ %	____ %	

TIPS TO CLOSE THE GAP

✓ **CALENDAR PREVIEW** — Review your upcoming week & remove unnecessary meetings, activities

- *Do you need to be involved in the activity? If so, what’s your role?*
- *Can someone else attend & catch you up?*
- *Can you reduce the meeting/activity to recoup time?*

✓ **START WITH “NO”** — when someone tries to break into your calendar, tell them no and offer to schedule the work at an appropriate time

✓ **PUT HOURS ON ‘RESERVE’** — reserve time daily to work without interruption (no meetings, no phone, no mail); use the same time each day to build habits

✓ **PLAN & RE-PLAN** — take the first 15 minutes of the day to plan your day and the last 30 minutes to review your plan; move items to tomorrow’s plan and address any outstanding priorities

MEETING EFFECTIVENESS

EFFECTIVE MEETINGS ENABLE QUALITY DECISION-MAKING AND TEAM PERFORMANCE

Effective meetings are ones that:

- Start and end on time
- Include only the people necessary to contribute to the decision
- Explicitly state clear decision authority in the room
- Utilize clear agendas, outcomes, roles and next steps
- Have actions and notes shared immediately after

WHO SHOULD BE IN THE ROOM? WHAT ROLE DO THEY PLAY IN THE PROCESS?

WHO NEEDS TO…	ATTENDANCE?	ROLE INFO
MAKE THE DECISION	Required	*Decision makers must be in the meeting and be given clear authority rights*
BE ENGAGED	Optional *(if available)*	*Empower relevant staff by providing line of sight to decision process*
PROVIDE INFO FOR DECISION MAKERS	Optional *(provide info in advance)*	*Enablers provide information (data, insights, etc.) prior to the meeting*
BE INFORMED	Not Required *(receive notes)*	*All others should be updated with actions, outcomes, and notes promptly*

MEETING INVITE TEMPLATE

- **Meeting Purpose**
  - ✓ Why are you calling this meeting?
  - ✓ Why have you invited the attendees?
- **Agenda**
  - ✓ What topics will you cover?
- **Meeting Objectives**
  - ✓ What is the desired outcome?
  - ✓ What decisions need to be made?

MEETING BEST PRACTICES

- **Standard Agenda**
- **Parking Lot, Action Items**
- **Roles**
  - ✓ Facilitator
  - ✓ Scribe
  - ✓ Rabbit Hole Monitor
  - ✓ Timekeeper
  - ✓ Rewarder
  - ✓ Energy Monitor
  - ✓ Observer

EFFECTIVE MEETINGS START WITH PREPARATION

MEETING ROLES

ASSIGN MEETING ROLES TO PARTICIPANTS TO ENABLE MEETINGS

Utilizing meeting roles creates a safe culture for team members to keep discussions productive and enables teams to effectively reach decisions. These example meeting roles ensure meetings are an effective use of everyone's time and the correct forum for the actions at hand.

Assign roles to team members when setting up recurring meetings and during long (>90 minute) sessions. Follow these tips:

- Place team members in roles for which they will exhibit the desired behaviors
- Use roles as opportunities to grow team skills and build fluency
- Rotate roles, as needed, to avoid the roles "getting old" or behaviors slipping back to the norm

EXAMPLE STANDARD ROLES FOR MEETINGS

FACILITATOR	SCRIBE
Guides the flow of the meeting through the agenda items to meet the meeting Purpose and Objectives	*Captures actions and parking lot items as needed*
[NAME]	*[NAME]*
RABBIT HOLE MONITOR	TIMEKEEPER
Calls conversational 'rabbit holes' when a conversation is going off track	*Calls time at regular intervals to ensure agenda stays on track*
[NAME]	*[NAME]*
REWARDER	ENERGY MONITOR
Acknowledges positive behaviors displayed by team members	*Calls breaks when the team seems to be losing energy, in need of a break*
[NAME]	*[NAME]*
OBSERVER	OTHER
Notices and shares how team operates and behaves in accordance with team agreements	*Other tasks as needed*
[NAME]	*[NAME]*

FIVE STEP, FIVE MINUTE PROGRESS CHECKS

CHECK IN WITH YOUR TEAM MEMBERS AND ACTION OWNERS ON DELIVERABLE PROGRESS

Quick progress checks allow you to stay current on deliverable status. In the discussion, seek to understand risks and barriers to progress while using the opportunity to recognize early successes.

Take five minutes per person to go through these five steps.

Tip: Keep the conversation quick, casual and low pressure!

PROGRESS CHECKS

1 **START WITH STATUS**

- *"To keep our work and the project on track, I want to be sure we stay on top of progress– have you completed your action item?"*

2 **IF ACTION IS COMPLETE**

- *"Great, what was the outcome? What else is needed? What can I and the team do next?"*

3 **IF ACTION IS NOT COMPLETE**

- *"Okay, what's gotten in your way and how can I and the team help resolve or remove the barrier to keep us on track?"*

4 **RECAP**

- *"Just to clarify, you are going to do [your commitment] and I and the team will do [our commitment] by [agreed upon date]."*
- *"I'll set another check-in for then to see the status"*

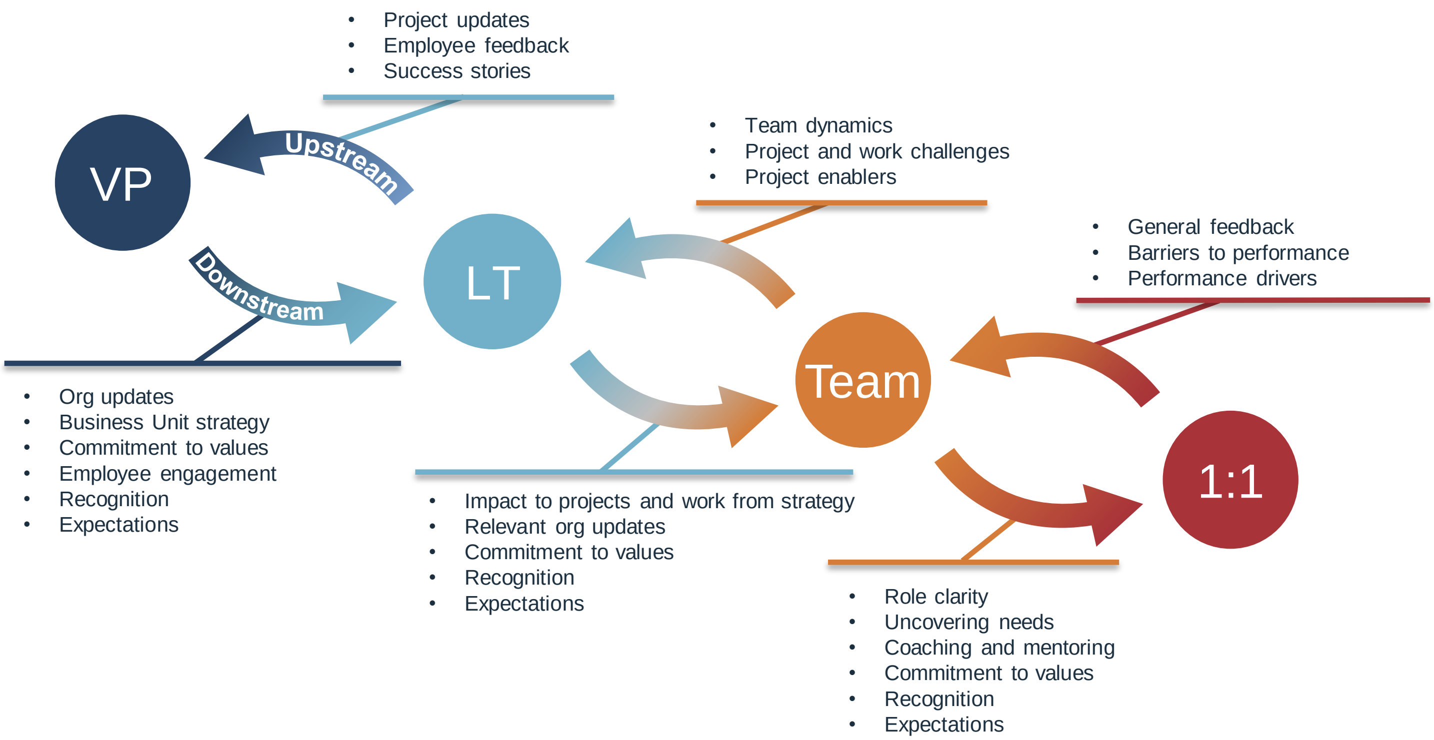
5 **CLOSURE**

- *"Thank you for the minute. Please let me know if you need anything else before our next check-in."*

EFFECTIVE PROGRESS CHECKS ALLOW YOU TO REINFORCE PROGRESS AND REMOVE BARRIERS

CREATING COMMUNICATION LOOPS

STRONG FEEDBACK LOOPS ALONG ALL LEVELS LEAD TO CLEAR OBJECTIVES AND ENGAGED EMPLOYEES



Create productive communication loops by utilizing these standing agendas at each level. These loops allow positive success stories, critical barriers and key updates to rise to the top while driving behavior change and important corporate initiatives into the organization.

STANDING *AGENDA* FOR COMMUNICATION LOOPS

Leadership Team

- Recognition Minute (3 min)
  - Examples of values in action
- Business Unit Updates
- Focus Topic; example:
  - Performance planning
  - Key Initiative update
- Ways of Working
  - Positive gossip, enablers, wins, and success stories
  - Threats, risks, concerns

Team

- Recognition Minute (3 min)
- Business Unit Updates
- What's happening: Next 1-2 wks
  - Project focus
  - Major decisions and events
- Ways of Working
  - How is the team feeling?
  - What progress and wins have we had? Who has been helpful?
  - What are the challenges? How can I help?

1:1

- Recognition Minute (3 min)
- Overall, how are you feeling?
  - Is the pace sustainable? (pace/speed/workload)
  - Are you enjoying the work? (fun/interesting/engaging)
  - How is the team support? (environment/cohesion/brokers)
- Do you need information or support from others?
- Finally, what can I do to help?